

Chapter 5

PM Module

PMs are Work Orders that are completed on a piece of Equipment or at a Location on an ongoing basis (ie: weekly, monthly, annually). Use this module to create PM records, assign plans to PM records and generate PM work orders. This Chapter describes how to use the Web Work, PM module.

Table of Contents

1.1	OVERVIEW OF THE PM MODULE.....	3
2.1	CREATING PMS	4
2.1.1.	<i>Creating PMs.....</i>	4
2.1.2.	<i>Creating PMs – Example 1.....</i>	5
3.1	ADDING ESTIMATES TO A PM.....	7
3.1.1.	<i>Adding Estimates - Tasks.....</i>	7
3.1.2.	<i>Adding Estimates – Labour</i>	8
3.1.3.	<i>Adding Estimates - Materials</i>	10
3.1.4.	<i>Editing PM Estimates</i>	12
4.1	PM ACCOUNTS	12
4.1.1.	<i>Applying PM Costs to more than one Account.....</i>	13
5.1	DELETING PM RECORDS	14
6.1	PERFORMING PM QUERIES	15
6.1.1.	<i>To perform a PM Query</i>	15
7.1	GENERATING PMS	16
7.1.1.	<i>Generating Calendar Based PMs.....</i>	16
7.1.2.	<i>Generating Meter Based PMs</i>	18
7.1.3.	<i>Generating Specific PMs.....</i>	19
8.1	PRINTING PMS.....	20
8.1.1.	<i>Printing PM's you have Generated</i>	20
8.1.2.	<i>Printing Individual PM Records.....</i>	21
8.1.3.	<i>Printing Multiple PM Records.....</i>	21
9.1	SHOW WOS	22
10.1	PM CALENDARS	23


11.1 PM – REPORTS 25

11.1.1. Creating PM Reports..... 25

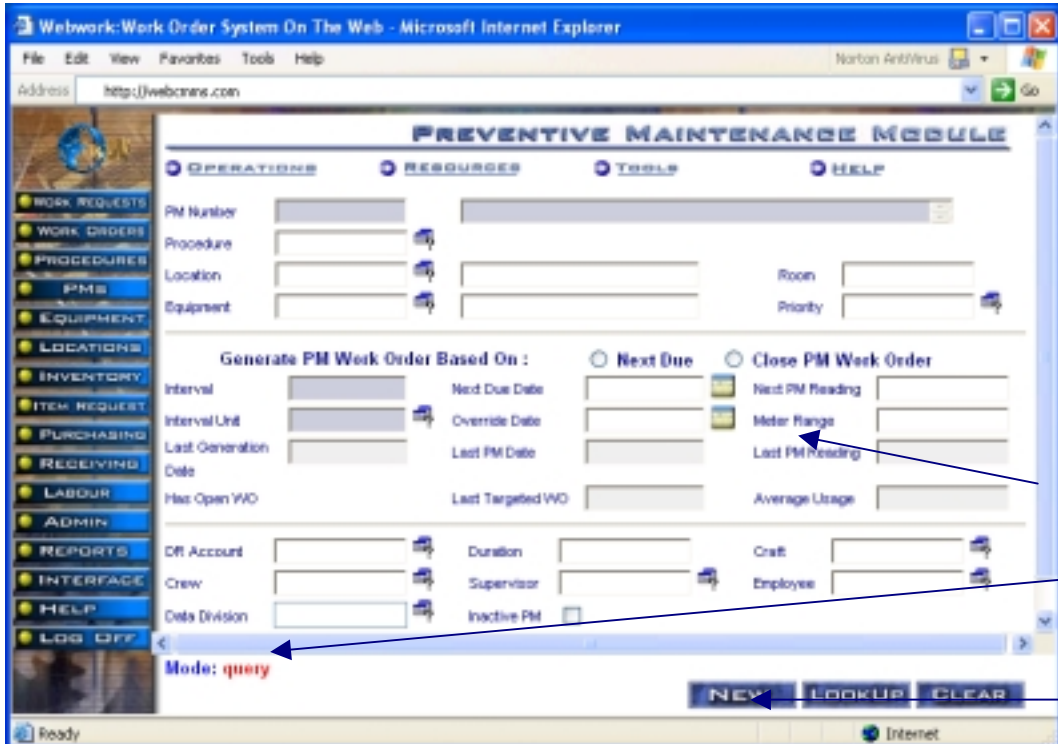
11.1.2. Printing PM Reports..... 26

12.1 LINKS..... 26

1.1 Overview of the PM Module

Click on the PM's button  on the left hand side of the screen to open the PM Module.

When you start the PMs module you will be in Query mode as shown in the screen below:



Click on any field name to open the Help file for that field.

The mode you are in is displayed at the bottom of the screen.

Click on the NEW button to open a new PM.

The OPERATIONS  OPERATIONS, RESOURCES  RESOURCES, TOOLS  TOOLS and HELP  HELP drop down menus contain the various features available in the PMs module.





Web Work includes "help files" for all field names. To access these help files, click on the field name. A popup window will open displaying help for the field selected.

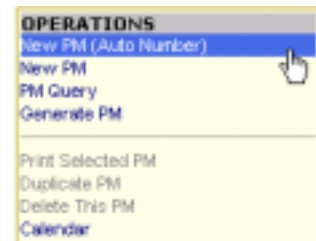
2.1 Creating PMS

Create PMs for work that is to be done on a piece of equipment or at a location, on a regularly scheduled basis. Creating preventive maintenance work orders saves time and money and ensures your equipment is kept in top working order.

2.1.1. Creating PMs

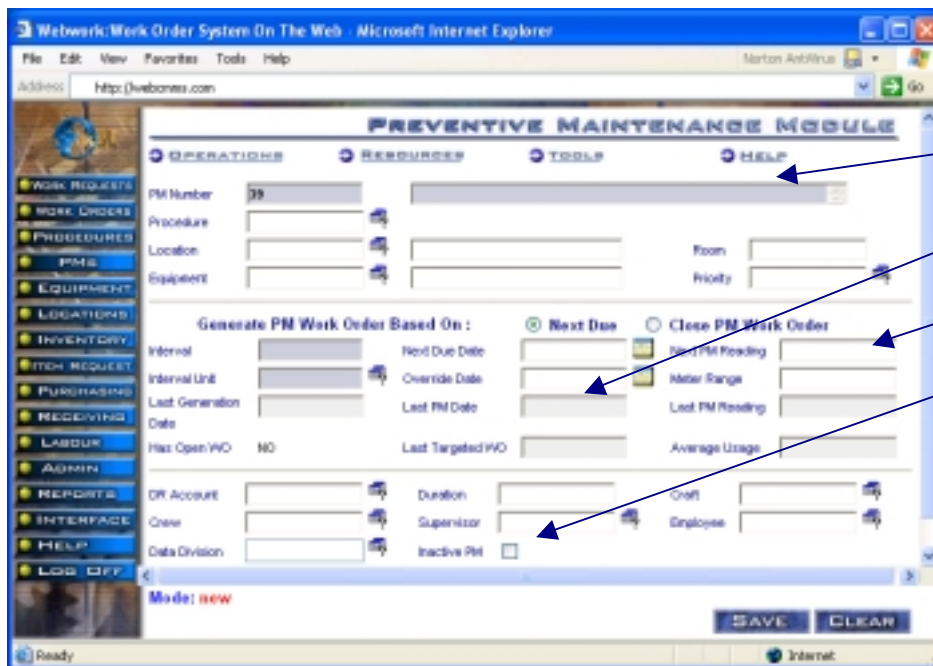
To create a PM:

- Click on the PM's button  on the left hand side of the screen to open the PM Module.
- Click on the  **OPERATIONS** menu and select New PM or New PM Auto Number from the drop down menu.



Auto-Numbering is set up in the Admin module of Web Work. For more information on auto-numbering see the Admin section of this manual.

A screen similar to the one shown below will open:



The dark blue fields are required fields.

The light fields are read only fields.

The white fields are optional fields.

If this PM is inactive click on the Inactive PM checkbox.

- Enter information into the fields displayed on the screen. For information on field contents click on any field name – this will open a popup help window for that field name.

Note: The *PM Number*, *Description*, *Interval*, *Interval Unit* and *Next Due Date* are the only required fields, all other fields are optional.



Double click on the PM description field to open a larger popup window for this field.






- Click on the **SAVE** button  to save the PM work order.



The Web Work system defaults can be setup to preapprove all PM work orders when generated. See the Admin section of this manual for more information on setting up system defaults.





2.1.2. Creating PMs – Example 1

In this example we will create a PM Work Order for the annual cleaning of Gutters at the main warehouse.

- Click on the **PM's** button  on the left hand side of the screen to open the PM Module.
- Click on the **OPERATIONS** menu  and select New PM Auto Number from the drop down menu.
- In the description field write: Annual Gutter Cleaning.
- There is no predefined procedure for gutter cleaning so we will skip this field.
- In the location field type in MAINWH or click on the **QUERY** button  to select Main Warehouse from the Web Work database. The location description populates with the description assigned to this location.
- In the equipment field type 61 or click on the **QUERY** button  to select Gutters - Main Warehouse from the Web Work database. The equipment description populates with the description assigned to this equipment.
- Click on the radio button beside Next Due or Close PM Work Order. In this example we shall choose Next Due.
- Enter an interval. Since this is an annual PM the interval will be 1.
- Enter an interval unit or click on the **QUERY** button  to select an interval from the Web Work database. In this example we shall select Year.



Since we selected interval - 1 and interval unit - year, this PM will be generated once per year.

- The Has Open WO field is a read only field. It will remain blank till you save the PM, then NO will appear in this field, indicating there is no open pm work order for this PM.
- The Last Generation Date field is a read only field. It will be populated with the last generation date after this PM is generated.
- Enter the Next Due Date. In this example it will be 4/07/2002.
- There is no Override date so skip this field.
- The Last PM Generation field is a read only field.
- The Last Targeted Work Order field is a read only field which populates with
- The Next PM Reading field is where you would enter any applicable meter reading. In this example there is no reading.
- There is no Meter Range for this PM.
- There is no Last PM Reading for this PM.
- There is no Average Usage for this PM.
- In this example all maintenance done on the Main Warehouse is charged to the Maintenance General Repairs account. Enter 600-521-683B into the Account field or click on the **QUERY** button  to select this account from the Web Work database.
- In the crew field enter CREW1.
- It usually takes 3 hours to perform gutter cleaning at the main warehouse. Enter a 3 into the duration field.
- Enter BHENRY into the Supervisor's field or click on the **QUERY** button  to select Brian Henry's code from the Web Work database.
- Enter Labourer into the craft field or click on the **QUERY** button  to select Labourer from the Web Work database.
- Enter DSMITH as the Employee assigned to this PM.
- Click on the **SAVE** button  to save the PM work order.

After this PM is generated and completed:

- The Last Generation Date will populate with the date of the PM generation
- The Next Due Date will change to a year after the last PM was generated
- The Last PM Date will populate with the date the last PM was generated
- The Last Targeted WO Date will populate with the date the work order was generated


3.1 Adding Estimates to a PM

Estimates can be added to a PM work order to indicate the tasks, labour and materials required to complete the preventive maintenance work order.

3.1.1. Adding Estimates - Tasks

By adding tasks to a PM work order, the employee assigned to complete the PM will be provided with a checklist of all estimated tasks for completing the work.


To add tasks to a PM work order:

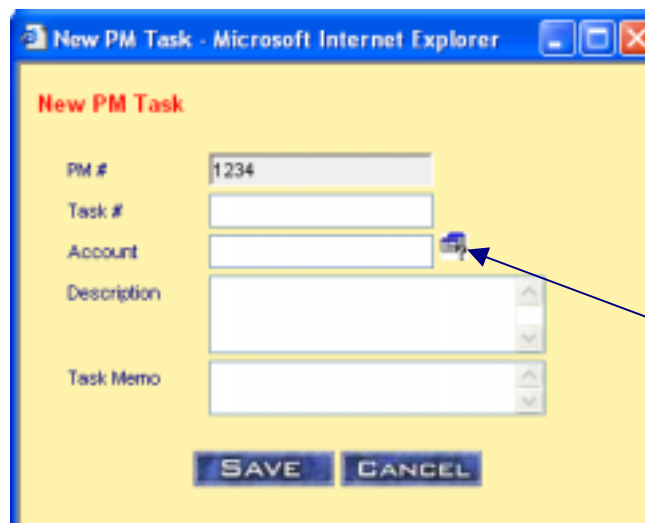
- Open the applicable PM work order in Edit mode.
- Click on the  **RESOURCES** menu to display the drop down menu.
- Select Estimates from the drop down menu.




Tasks	Labour	Material
--------------	--------	----------

Task #	Description	Memo
--------	-------------	------

- In the Add Estimates screen there are three tabs: Tasks, Labour and Materials.
- Click on the Tasks folder to open it. Note: when you enter the Estimates screen, you will be in Task mode.
- Click on the **NEW** button  to open the New PM Task screen as pictured below:




Click on the QUERY button to locate and select an Account from those listed in the Web Work database.

- The PM # is populated with the PM number and cannot be edited.
- Enter a task number. IE: 1, 2, 3 or A. B. C. etc.
- Enter an Account if applicable or click on the **QUERY** button  to select an account from the Web Work database.



Leave the account field blank if this task is going to be split between multiple accounts. See PMs – Accounts for more information.

- Enter a Description of the task. IE: Turn off the main breaker.
- Enter a Task Memo. IE: The main breaker is located in the electrical room off the kitchen on the main floor.
- Click on the **SAVE** button  at the bottom right hand side of the screen to save the task.

This will return you to the Estimates screen in Task mode where you can continue to add Tasks, add Labour or Materials or return to the main screen of the procedure.




To return to the main screen of a PM after saving an Estimate, click on the **CANCEL** button at the bottom right hand side of the page or click on the **RESOURCES** menu and select Details from the drop down menu.

3.1.2. Adding Estimates – Labour


Add labour to a PM to indicate which craft/employee/contractor is required to perform the work.

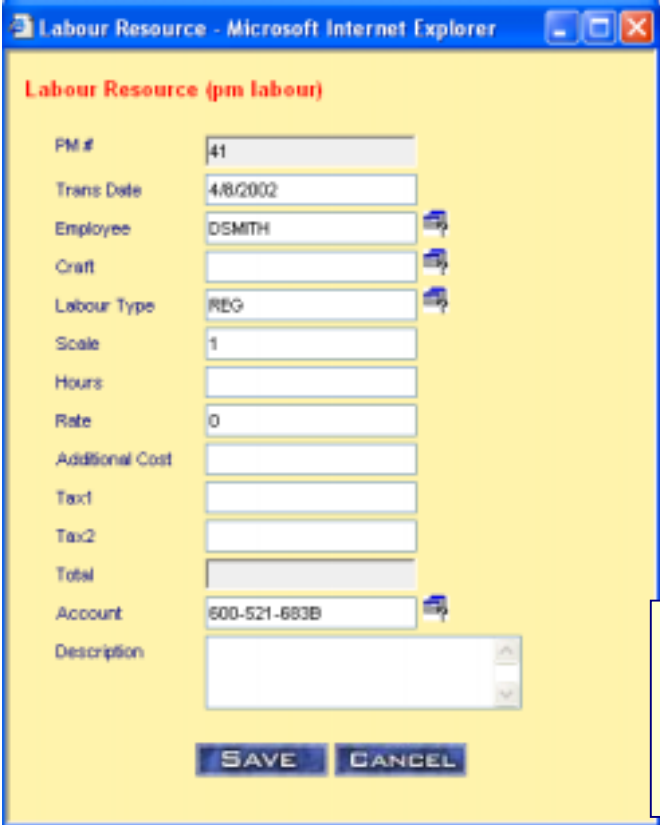
To add labour to a PM:


- Open the applicable PM in Edit mode.
- Click on the  **RESOURCES** menu to display the drop down menu.
- Select Estimates from the drop down menu.


<div> <div>Tasks</div> <div>Labour</div> <div>Material</div> </div>							
Date	Employee	Name	Account	Rate	Add.Cost	Hrs	Cost
Total						0	\$0.00

- In the Add Estimates screen there are three tabs: Tasks, Labour and Materials.
- Click on the Labour folder to open it. Note: when you enter the Estimates screen, you will be in Task mode.



- Click on the **NEW** button  to open the Labour Resource screen as pictured below:




- The PM # and Trans Date fields are filled in automatically. The PM # field cannot be edited, however the Trans Date field can. To edit this field, delete the current date and add the date of your choice.
- Enter an employee or click on the **QUERY** button  to select an employee from the Web Work database. If a rate for the employee you choose has been entered in the Labour module the rate field will be updated with this amount.

When you click on the **QUERY** button  beside the Employee field, a screen such as the one shown below will open.

You can filter the information by: the Code or Name of your choice, or by Employee, Requester, All or Vendor.

- Enter a craft or click on the **QUERY** button  to select a craft from the Web Work database.
- Enter a Labour Type or click on the **QUERY** button  to select a labour type from the Web Work database.

- The Scale automatically defaults to 1. To change this, delete the current scale and add the scale of your choice.
- Enter the estimated number of hours into the Hours field. When you enter the number of hours, the taxes and total will be calculated by the Web Work system.
- The Rate field will be filled in with the rate setup for the employee in the Labour module. To change this rate, delete the rate shown and enter the rate of your choice.
- Enter any additional cost. If an additional cost is added, the taxes and total will be updated accordingly.
- Enter Tax 1 and 2 if applicable. If taxes are entered the total will automatically be recalculated.
- Enter an account if applicable.
- The Details field displays the complete name of the Employee you choose.
- Click on the **SAVE** button  at the bottom right hand side of the screen to save the labour estimate.

This will return you to the Estimates screen in Labour mode where you can continue to add Labour, add Tasks or Materials or return to the main screen of the PM.




When you save a task, labour or material estimate, the estimate will be displayed in the table on the related estimate screen.

3.1.3. Adding Estimates - Materials

Add materials to a PM to indicate the items required to do a job.


To add materials to a PM:

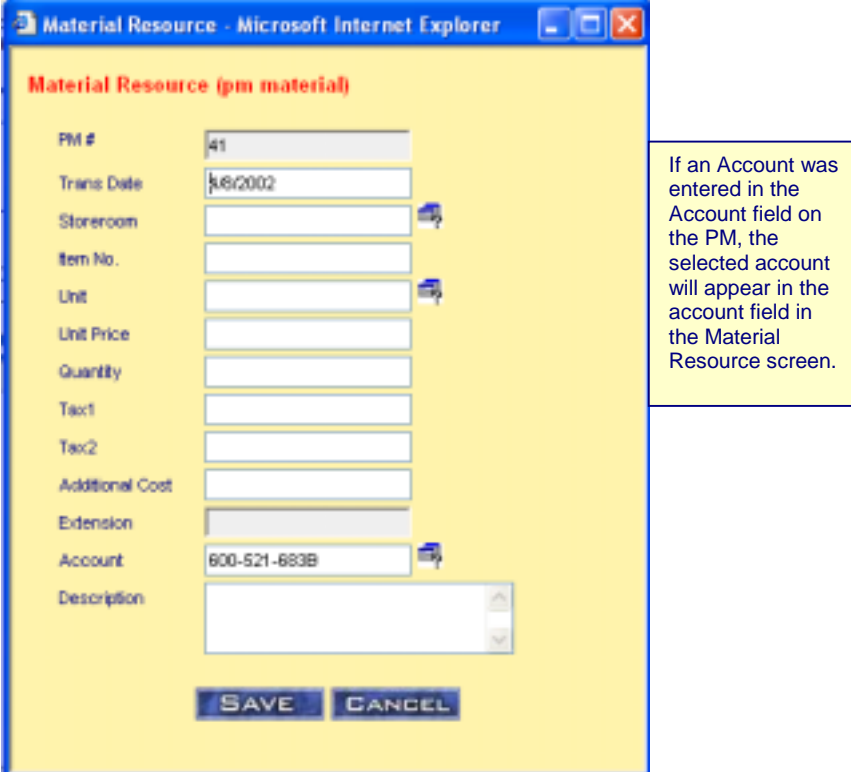
- Open the applicable PM in Edit mode.
- Click on the  **RESOURCES** menu to display the drop down menu.





Tasks		Labour		Material			
Date	Item	Description	Account	Quantity	Unit Price	Cost	
Total						\$0.00	

- Select Estimates from the drop down menu.


In the Add Estimates screen there are three tabs: Tasks, Labour and Materials.

- Click on the Material folder to open it. Note: when you enter the Estimates screen, you will be in Task mode.
- Click on the **NEW** button  to open the Material Resource screen as pictured below:



- The PM # and Trans Date fields are filled in automatically. The PM # field cannot be edited, however the Trans Date field can. To edit this field, delete the current date and add the date of your choice.
- Enter a storeroom or click on the **QUERY** button  to select a craft from the Web Work database.
- Click on the down arrow  to select a Storeroom from those set up in the Web Work system and then click on the **FILTER** button  to display a list of inventory in this storeroom.
- Click the radio button beside the inventory item you wish to select..
- This will populate the Storeroom, Item, Unit and Price fields on the Material Resource screen.
- Enter the quantity. The tax and extension fields will be calculated automatically.
- Enter any additional cost. When an additional cost is added, the tax and extension field will automatically be recalculated.
- Enter an account if applicable or click on the **QUERY** button  to select an account from the Web




Work database.

- The description field will automatically populate with the description of the Inventory item selected.
- Click on the **SAVE** button  at the bottom right hand side of the screen to save the material estimate.
- This will return you to the Estimates screen in Material mode where you can continue to add Materials, add Tasks or Labour or return to the main screen of the PM.

3.1.4. Editing PM Estimates

To edit PM estimates:

To edit procedure estimates:

- Click on the **PMs** button  on the left hand side of the screen to access the PMs module.
- Perform a PM query to locate and retrieve the procedure record you wish to edit. See PM queries for more information on procedure queries.
- Click on the  **RESOURCES** menu to display the drop down menu.
- Select Estimates from the drop down menu.
- Click on the task, labour or materials tab, depending on which one you want to edit.
- Click on the item from the task, labour or materials table that you wish to edit.
- Enter the new information into the applicable fields.
- Click on the **SAVE** button  at the bottom right hand side of the screen to save the edited estimate.



Updating the tasks for a PM does not update the associated procedure. To update the procedure, go to the procedure module, do a query to select the applicable procedure and then edit it as required.



4.1 PM Accounts

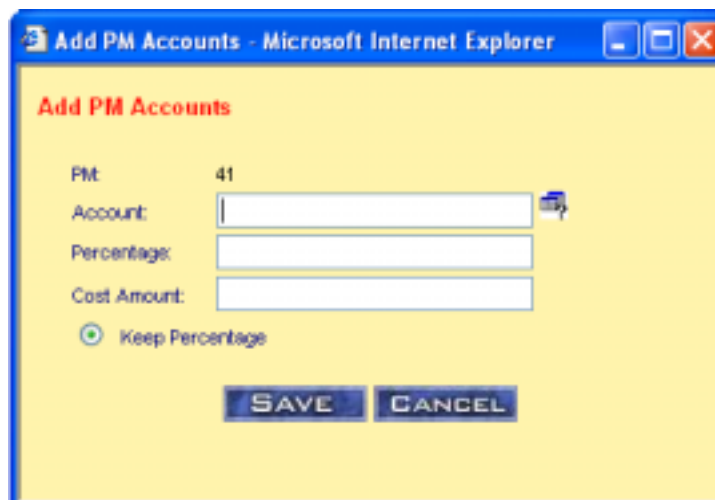
A PM can be assigned to one account or to a variety of accounts depending on the accounting practices of your organization. If only one account will be used to apply the labour and materials for a PM, simply enter the applicable account in the Account # field on the main PM screen.


When assigning PMs to multiple accounts you can set the costing to never exceed either the percentage rate or the cost total you choose.

4.1.1. Applying PM Costs to more than one Account


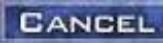
To apply PM costs to more than one account:

- Click on the **PM** button  on the left hand side of the screen to access the PM module.
- Perform a PM query to locate and retrieve the PM work order you wish to add Accounts to. See PM queries for more information on procedure queries.
- Click on the **RESOURCES** menu to display the drop down menu.
- Select Accounts from the drop down menu.
- The mode will change to Accounts mode.
- Click on the **NEW** button  to open the Add PM Accounts screen as pictured below:



 A screenshot of a web browser window titled 'Add PM Accounts - Microsoft Internet Explorer'. The main content area has a yellow background and is titled 'Add PM Accounts' in red. It contains the following fields: 'PM:' with the value '41', 'Account:' with an empty text box and a small icon to its right, 'Percentage:' with an empty text box, and 'Cost Amount:' with an empty text box. Below these fields is a radio button labeled 'Keep Percentage' which is selected. At the bottom are two buttons: 'SAVE' and 'CANCEL'.

- The PM # is populated with the PM number entered on the PM.
- Enter an account into the Account field, or click on the **QUERY** button  to select an account from the list of accounts in the Web Work database.
- Enter the percentage of the PM that is to be charged to this account. Do not enter a percent sign, only the numerical value of the percent.
- The cost amount will be calculated automatically by the Web Work system.



- Click the radio button  beside Keep Percentage.
- Click on the **SAVE** button  to save this account information.

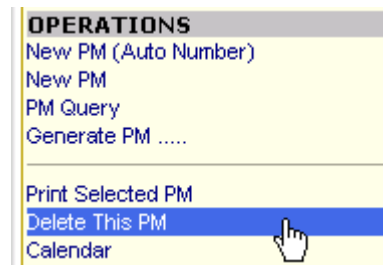
You can then return to the main PM screen by clicking on the  **RESOURCES** menu and selecting Details from the drop down menu or by clicking on the **CANCEL** button  on the bottom right hand side of the screen.

5.1 Deleting PM Records

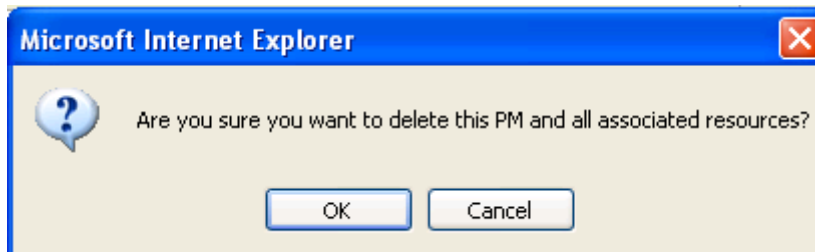
There may be times when it is necessary to delete a PM record, as would be the case if a piece of equipment is no longer part of the organization.

To delete a PM record:

- Click on the **PM** button  on the left hand side of the screen to access the PM module.
- Perform a PM query to locate and retrieve the PM work order you wish to delete. See PM queries for more information on procedure queries.
- Click on the  **OPERATIONS** menu at the top of the PMs Screen to display the drop down menu.
- Select Delete This PM from the drop down menu.



- A message box confirming you want to delete the procedure and associated resources will be displayed.



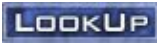




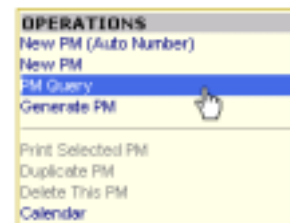
- Click on the **OK** button to delete the procedure or the **CANCEL** button to cancel this action.

6.1 Performing PM Queries

Web Work's query by example feature makes it easy to locate and retrieve records based on the criteria you choose. See Query by Example in the System Overview chapter of this manual for more information on query by example.

6.1.1. To perform a PM Query

- Enter the PMs module  by selecting it from the menu on the left hand side of the Web Work screen.
- When you enter the PMs module you will be in query mode. If you have been working in a different mode, click on the  **OPERATIONS** menu at the top of the PMs Screen to display the drop down menu.
- Select PM Query from the menu.
- The mode you are in is displayed at the bottom left hand side of the screen. (ie: query mode)
- Enter selection criteria into any of the fields.
- Click on the **LOOKUP** button  to display a list of the records, matching the specified criteria.
- To open any of these PM work orders click the selection box on the right hand side of the applicable PM Work Order(s) in the table, and then click on the **RETRIEVE** button  at the bottom of the screen.
- The PM will appear on the screen. If you selected multiple PMs, when you retrieve them an arrow will appear on the bottom left hand side of the screen.
- Click on this arrow  **Next** to move from one PM to the next.



Comparison operators such as: <, >, null, not null and % - wild card can be used to further define a query. See System Overview – Query By Example for more information.



7.1 Generating PMS

PMs are generated to produce work orders for the scheduled preventive maintenance work.

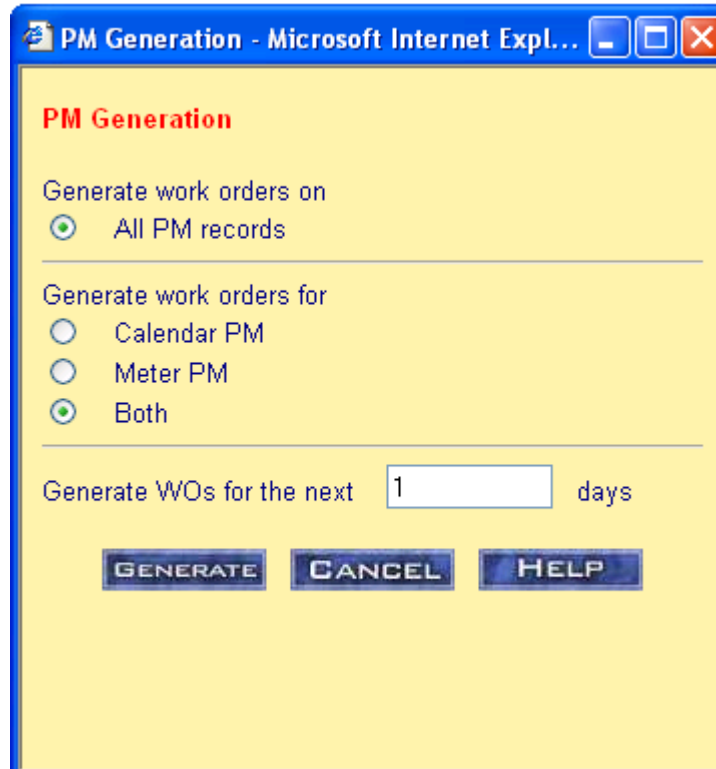
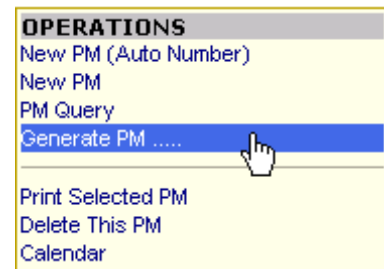
7.1.1. Generating Calendar Based PMs

PMs can be generated based on the criteria selected by the user.

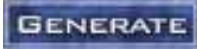
To generate all Calendar PM's for a specified number of days:

- Enter the PMs module  by selecting it from the menu on the left hand side of the Web Work screen.
- When you enter the PMs module you will be in query mode. Click on the  **OPERATIONS** menu at the top of the PMs Screen to display the drop down menu.
- Select Generate PM from the drop down menu.

The PM Generation screen as pictured below will open:

A screenshot of a web browser window titled "PM Generation - Microsoft Internet Expl...". The main content area has a yellow background and is titled "PM Generation" in red. It contains the following form elements:

- "Generate work orders on" section with a radio button selected for "All PM records".
- "Generate work orders for" section with three radio buttons: "Calendar PM", "Meter PM", and "Both". The "Both" radio button is selected.
- "Generate WOs for the next" section with a text input field containing the number "1" and the word "days" to its right.
- At the bottom, there are three buttons: "GENERATE", "CANCEL", and "HELP".

- By default the radio button beside All PM Records is selected.
- Click on the **RADIO** button beside Calendar PM.
- Enter the number of days in the future, you wish to generate PMs for into the Generate Wos for the next ____ days field.
- Click on the **GENERATE** button  to generate the PMs.

All calendar PMs for the number of days specified will be generated and a screen similar to the one shown below will open:



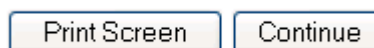
In this example we generated Calendar PMs for the next 7 days.

Click on the **PRINT SCREEN** button to print the list of PMs generated and their corresponding work order number. Click on the **CONTINUE** button to continue with printing the PM work orders.



You must generate Work Orders for at least 1 day. If you put a zero into this field it will force the generation of all PM work orders whether they are due or not.



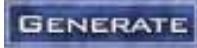
- To print the list of PMs and their corresponding work order numbers click on the **PRINT SCREEN** button or click on the **CONTINUE** button to continue with printing the PM work orders.

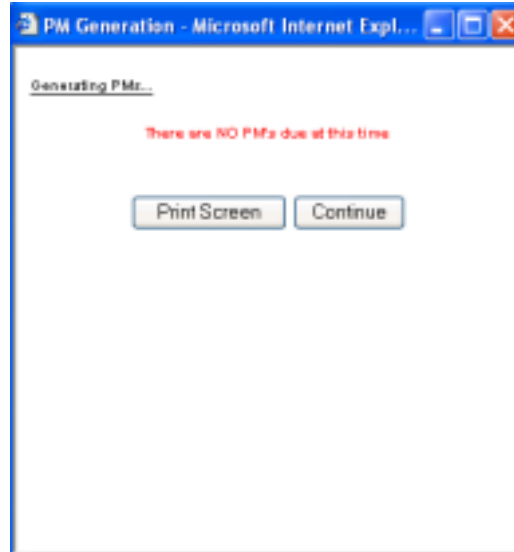
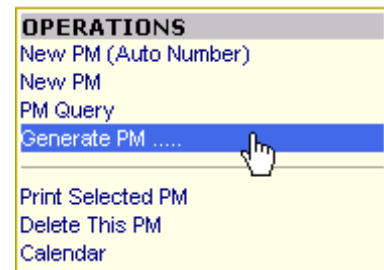


- If you select Print Screen, your printer window will open and you can proceed with printing the list of generated PMs.
- If you select Continue, the PM work orders will open in a new browser window. Click on File and select Print from the drop down menu to proceed with printing.

7.1.2. Generating Meter Based PMs

To generate Meter PM's for a specified number of days:




- Enter the PMs module  by selecting it from the menu on the left hand side of the Web Work screen.
- When you enter the PMs module you will be in query mode. Click on the  **OPERATIONS** menu at the top of the PMs Screen to display the drop down menu.
- Select Generate PM from the drop down menu.
- By default the radio button beside All PM Records is selected.
- Click on the radio button beside Meter PM.
- Click on the **GENERATE** button  to generate the PMs.
- All meter based PMs will be generated.
- If there are no PMs due for generation a screen similar to the one pictured below will open:



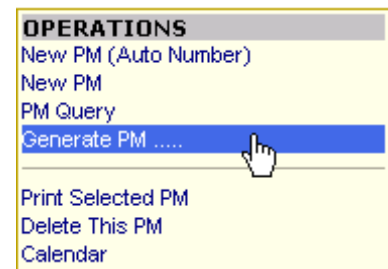
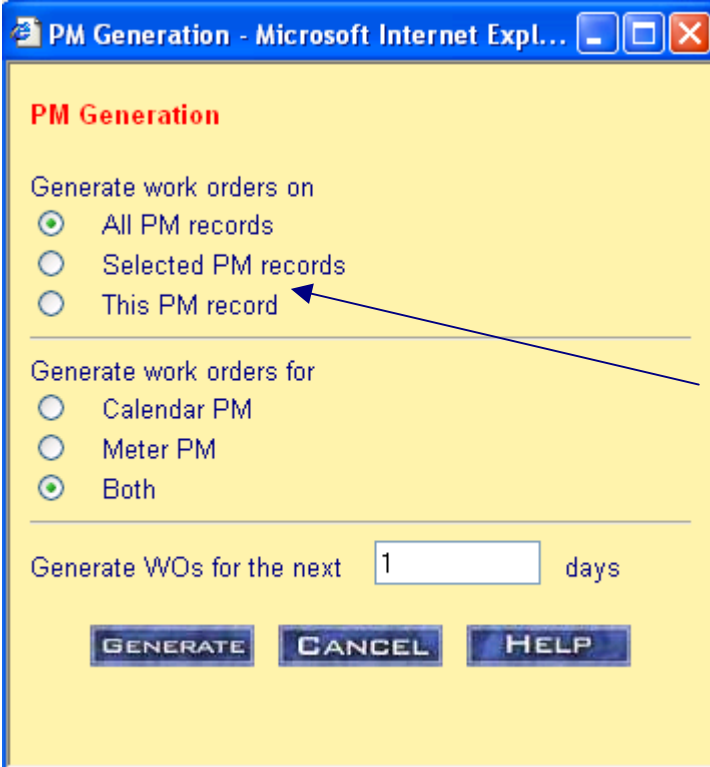
- If PMs generated, click on the **PRINT SCREEN** button to print the list of generated PMs along with their corresponding work order numbers or click on the **CONTINUE** button to continue to printing the PM work orders.

7.1.3. Generating Specific PMs

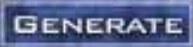
To generate a specific PM:

- Enter the PMs module  by selecting it from the menu on the left hand side of the Web Work screen.
- When you enter the PMs module you will be in query mode. If you have been working in a different mode, click on the  **OPERATIONS** menu at the top of the PMs Screen to display the drop down menu.
- Select PM Query from the drop down menu.
- Enter selection criteria into the applicable fields. For more information on performing PM queries see the Performing PM Queries section of this manual.
- Retrieve the applicable PM(s).
- Click on the  **OPERATIONS** menu at the top of the PMs Screen to display the drop down menu.
- Select Generate PM from the drop down menu.

A screen similar to the one pictured below will open:

Click on the radio button beside Selected PM records to generate all the PM records your query returned. Click on the radio button beside This PM record to generate the PM record that is open on the screen.

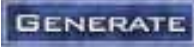
- Click on the radio button beside Selected PM records to generate all PMs that you retrieved. Click on the radio button beside This PM record to generate only the PM open on the screen.
- Enter the Number of Days you wish to generate this (these) PM(s) for into the Generate Wos for the next ____ days field.
- Click on the **GENERATE** button  to generate the PMs.
- Click on the **PRINT SCREEN** button to print the list of generated PMs along with their corresponding work order numbers or click on the **CONTINUE** button to continue to printing the PM work orders.

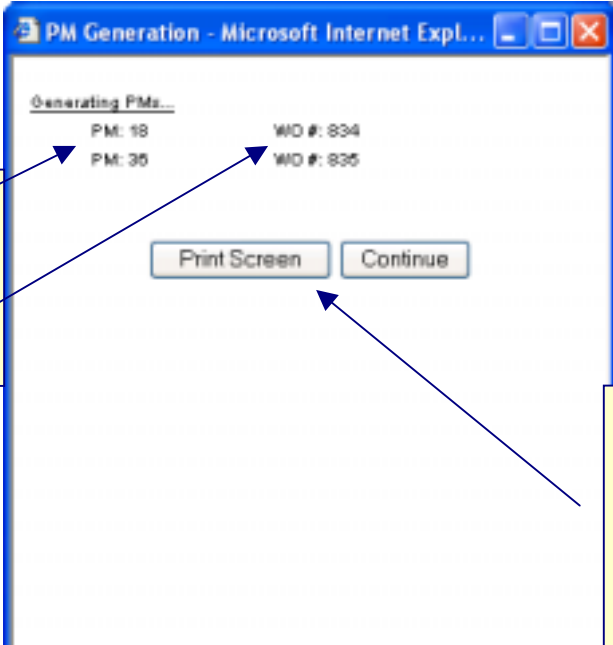


You must generate Work Orders for at least 1 day. If you put a zero into this field it will force the generation of all PM work orders.

8.1 Printing PMs

8.1.1. Printing PM's you have Generated

After selecting the criteria for your PM generation and clicking on the **GENERATE** button  a screen similar to the one shown below will open:



This column shows the PM # that was generated.

This list shows the work order number that was assigned to the generated PM.

Click on the **PRINT SCREEN** button to print this list of generated work orders or on the **CONTINUE** button to continue with printing the generated PM work orders.

- A list displaying all PMs that are generated along with the work order number they have been assigned to will be displayed.




If no PMs were generated based on the criteria you selected for the PM generation, a message stating "no PMs due at this time" will appear.

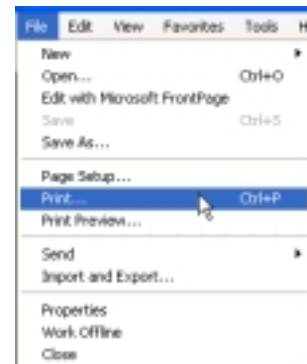
- To print this list click on the **PRINT SCREEN** button.
- To print these PMs click on the **CONTINUE** button. Another browser window will open showing the PM Work Orders. Click on File and select Print from the drop down menu to print these PMs.

8.1.2. Printing Individual PM Records

If you wish to print PM records, as opposed to the PM work orders you have generated, there are two ways to do so. You can print an individual PM record or a batch of PM records that you have selected and retrieved.


To print only the PM that is open on the screen:

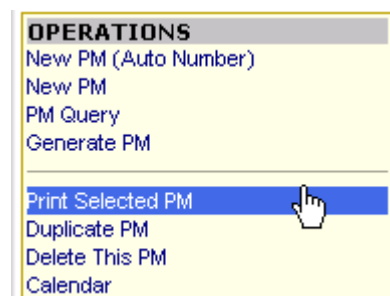
- Click on the **PRINT** button  at the bottom right hand side of the screen.
- The selected record will open in a new browser window.
- Click on File and select Print from the drop down menu to proceed with printing.



8.1.3. Printing Multiple PM Records

To print a batch of PMs:




- Perform a PM query to open the desired PMs. See PM Queries for more information on performing PM queries.
- Click on the  **OPERATIONS** menu and choose Print Selected PM from the drop down menu.
- The selected records will open in a new browser window.
- Click on File and select Print from the drop down menu To proceed with printing.



9.1 Show WOs

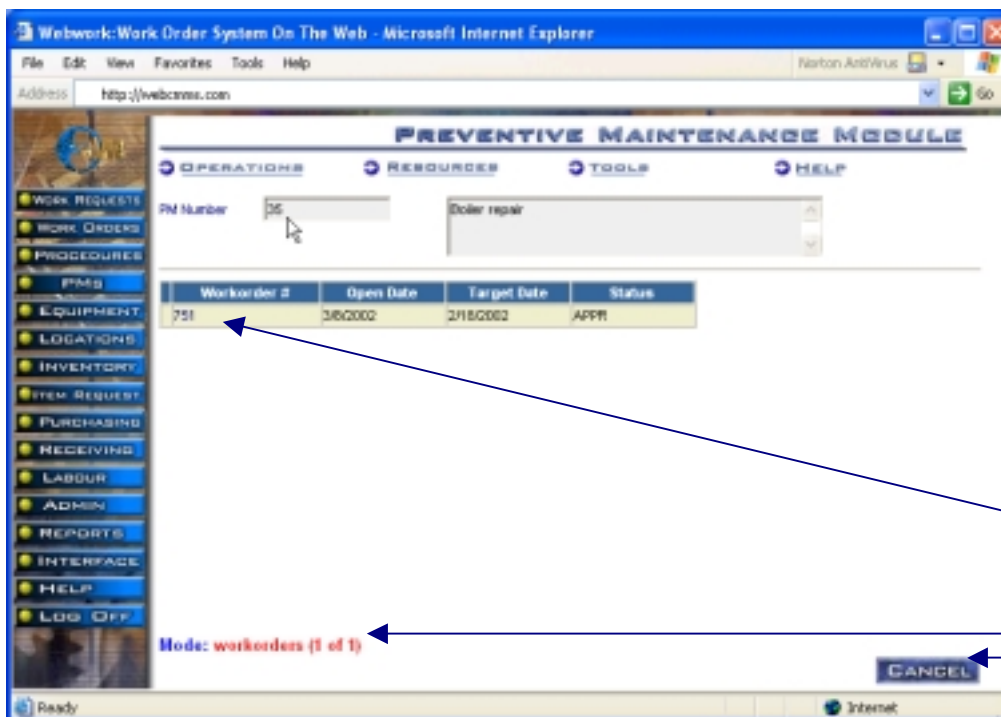
The Web Work show Wos feature will display a list of open work orders for a selected PM.

To show WOs:



- Enter the PMs module  by selecting it from the menu on the left hand side of the Web Work screen.
- When you enter the PMs module you will be in query mode. If you have been working in a different mode, click on the  **OPERATIONS** menu at the top of the PMs Screen to display the drop down menu.
- Select PM Query from the drop down menu.
- Enter selection criteria into the applicable fields. For more information on performing PM queries see the Performing PM Queries section of this manual.
- Retrieve the applicable PM(s).
- Click on the  **RESOURCES** menu and select Show WOs from the drop down menu.



A screen similar to the one pictured below will open:



- Click on the Work Order # to open the work order.

Click on the **CANCEL** button  or on the  **RESOURCES** menu and select Details from the drop down menu.

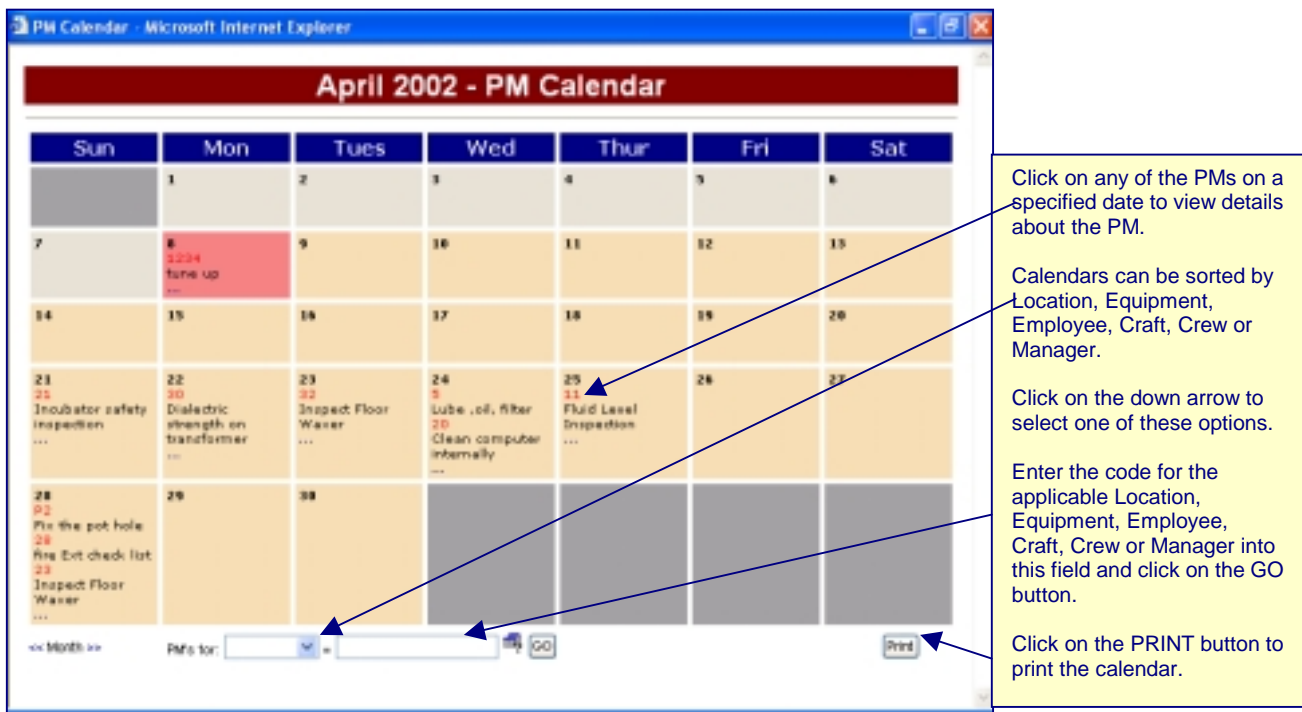
10.1 PM Calendars

The PM module includes a calendar, which displays the PMs scheduled for each day.

To view the calendar, click on the  **OPERATIONS** menu and choose Calendar from the drop down menu.



A screen similar to the one pictured below will open:



Click on any of the PMs on a specified date to view details about the PM.


Calendars can be sorted by Location, Equipment, Employee, Craft, Crew or Manager.


Click on the down arrow to select one of these options.


Enter the code for the applicable Location, Equipment, Employee, Craft, Crew or Manager into this field and click on the GO button.

Click on the PRINT button to print the calendar.

PM calendars can be sorted by Location, Equipment, Employee, Craft, Crew or Manager.

To sort click on the down arrow  beside the PMs for field and select Location, Equipment, Employee, Craft, Crew or Manager.

Enter the code for the applicable selection into the next field, or click on the **QUERY** button  and select the applicable code from the Web Work database.

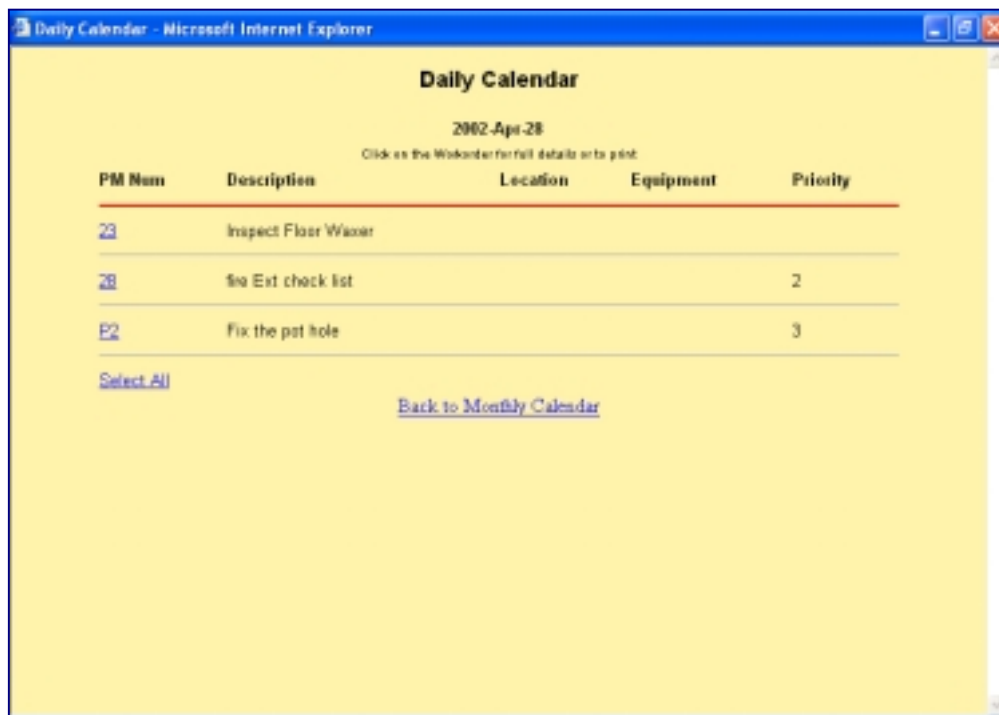
Click on the **GO** button  to display a calendar matching the criteria you selected.

Click on the arrows on either side of **<< Month >>** to move from one month to the next.

Click on the **PRINT** button  to print the selected calendar.

To view details about a specific calendar entry, click on the three dots after the applicable entry on the calendar.

A screen similar to the one pictured below will open:




To open the PM record for any of the PMs displayed click on the applicable PM #. To open all PMs displayed for this date click on Select All. To return to the monthly calendar click on Back to Monthly Calendar.



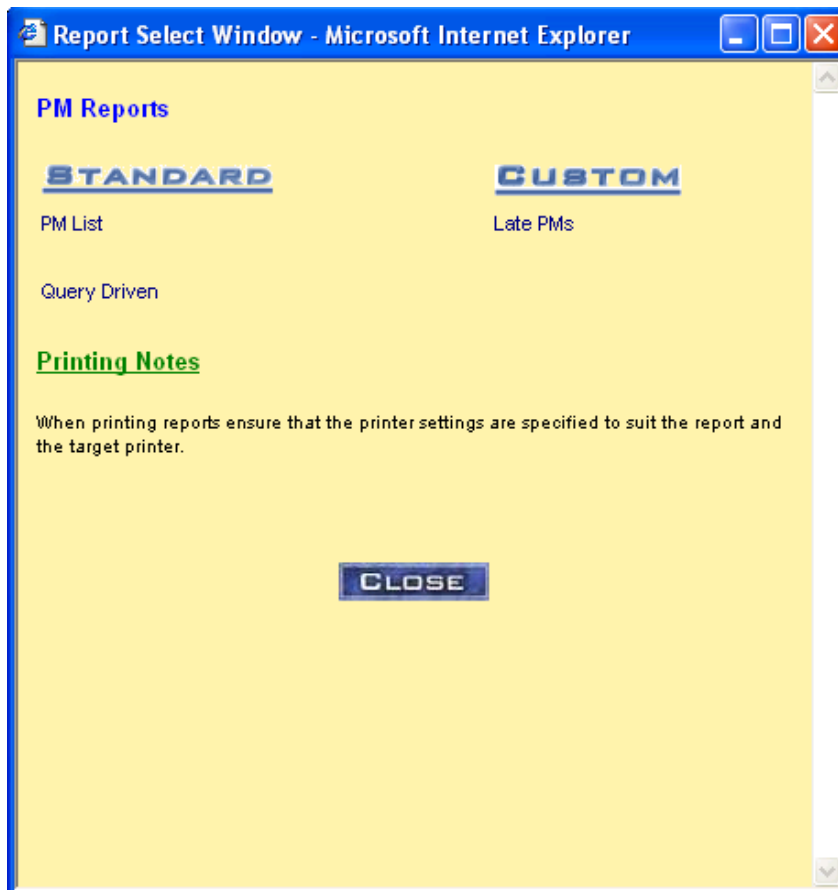
The PM Calendar is read-only. To make changes to a PM schedule you must open the applicable PM in edit mode and made any applicable changes.

11.1 PM – Reports

To access PM reports click on the  **TOOLS** menu and select Reports from the drop down menu.



A screen similar to the one shown below will open:




Click on any of the Reports listed under Standard or Custom, to open them.



Only reports applicable to the PMs module will be displayed. To view all reports, click on the **REPORTS** module button  on the left hand side of the Web Work screen. For more information about reports, see the Reports section of this manual.


11.1.1. Creating PM Reports

Reports cannot be created in the PMs module. To create a PM report click on the **REPORTS** module button  to access the report writer and create the report.

11.1.2. Printing PM Reports

PM reports can be printed from the PMs module or from the Reports module.


To print a report in the PMs module:

- Open the PMs module.
- Click on the  **TOOLS** menu and select reports from the drop down menu.
- Select the report you wish to print by clicking on its title.

The report will open in Preview mode.

- Click on File and select Print from the drop down menu to print the report.

12.1 Links

When you are in the PMs module and select Links from the  **TOOLS** menu, the Web Work Create/Edit Links window will open as shown below.

You can view existing links or create new links using this feature.



You can only view links, which have been setup to be accessible from this module or from all modules. Links set up in other modules with the accessibility set as only within that module will not be shown.